

CMS Net

Insurance Coverage

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Preface

Legend

In procedures on the following pages you will see various symbols used.

- ✓ The check mark indicates the result of an action.
- ➔ When a procedure is described, the arrow indicates a content note.

Insurance Coverage

Steps to Access Insurance Coverage

The Insurance Coverage Screen can be accessed either through the Eligibility Menu or through Event Tracking.

From the Eligibility Menu:

Step	Action
1	Start from the Eligibility Menu. ✓ The Patient Identification screen displays.
2	Identify and select the client.
3	Select the program period.
4	From the Eligibility Menu, select Insurance Coverage.
5	Press <Enter>.
6	✓ The Insurance Coverage screen displays.

From Event Tracking:

Step	Action
1	Start from the Event Tracking.
2	Select Insurance Coverage.
3	Press <Enter>. ✓ The Patient Identification screen displays.
3	Identify and select the client.
4	✓ The Insurance Coverage screen displays.

Insurance Coverage, Continued

Insurance Coverage Screen

The Insurance Coverage Screen holds the private insurance results from the MEDS Inquiry once you have selected to save such information to CMS Net. This screen also allows you to enter private insurance information specific to a client. Once this client becomes "Active" this information is sent to MEDS to be posted on the Health Insurance Segment (HIS) to assist in post payment recovery and cost avoidance.

➔ Use the <Down Arrow> to move from field to field.

CMSNET	INSURANCE COVERAGE	CMSELIG-61
Pt Nm: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX CCS#: 9999999 CIN: 99999999X 9 Gender: X DOB: 99/99/9999 Lgl Co: XXXXXXXXXXX REG=XXXXXXXX MED=X F/R=X		
Prgm Begin Date 99/99/9999 End 99/99/9999 CCS Elig Status XXXXXXXXXXXXXXXXXXXX		
1 Carrier: XXXXXXXXXXXXXXXXXXXXXXXXXXXX+ CCode: XXXX Type: XXXXXXXXXXXX+ St1: XXXXXXXXXXXXXXXXXXXXXXXXXXXX Pol #: XXXXXXXXXXXXXXXXXXXXXXXXXXXX St2: XXXXXXXXXXXXXXXXXXXXXXXXXXXX Deductible: 999999 Max Benefit: 999999 Cty: XXXXXXXXXXXXXXXXXXXXXXXXXXXX St: XX Start: 99/99/9999 Stop: 99/99/9999 Zip: 99999-9999 Ph #: 999-999-9999 Scope: XXXXXXXXXXXXXXXX Policy Holder Information: Excluded Benefits XXXXXXXXXXXXXXXX Last First M Nm: XXXXXXXXXXXXXXXX XXXXXXXXXXXX X Phone #: 999-999-9999 Relationship to Pol. Holder: XXXXXXXX+ Comments: XX XXX XXX Last Update By: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX Date: 99/99/9999		

Insurance Coverage, Continued

Insurance Coverage Field Descriptions

The following table provides a brief description of the data displayed on the Insurance Coverage screen.

Field Name	Description
(Header)	Display only System displays the standard patient header.
Pgrm Begin Date	Display only Program begin date. System displays this date from the Pending Eligibility screen.
End	Display only Program end date. System displays this date from the Pending Eligibility screen.
CCS Elig Status	Display only System displays the client's CCS eligibility status.
Carrier	Required Carrier name. <i>When insurance information is either retrieved from HIS or sent to HIS from CMS Net, updates to the Carrier field will not be allowed.</i> However, you can add new insurance information and select an insurance carrier from the pick list. If you cannot find the insurance carrier in the pick list, contact the CMS Net Help Desk. See Appendix A for helpful hints on locating the correct carrier.
CCode	Display only Carrier code. System displays the code associated with the insurance carrier.
Type	Optional Type of Insurance Coverage. Select from pick list. EPO HMO PPO Indemnity Other
St1	Display only Health Insurance Carrier Street 1 Address. System displays the first line of the street address associated with the health insurance carrier.
Pol #	Required Health insurance policy number. Enter policy number.
St2	Display only Health Insurance Carrier Street 2 Address. System displays the second line of the street address associated with the health insurance carrier.

Insurance Coverage, Continued

Field Name	Description
Deductible	Optional Enter the dollar amount. No commas, periods, or \$ signs allowed.
Max Benefit	Optional Maximum Benefits Amount. Enter the dollar amount. No commas, periods, or \$ signs allowed.
Cty	Display only Health Insurance Carrier City. System displays the city associated with the health insurance carrier.
St	Display only Health Insurance Carrier State. System displays the state associated with the health insurance carrier.
Start	Optional Policy start date. Enter the start date for the insurance policy coverage. MM/DD/YYYY, MMDDYYYY, or MM-DD-YYYY
Stop	Optional Policy stop date. Enter the ending date for the insurance policy coverage. MM/DD/YYYY, MMDDYYYY, or MM-DD-YYYY
Zip	Display only Health insurance carrier zip. System displays the zip code associated with the health insurance carrier.
Ph #	Display only Health insurance carrier phone number. System displays the phone number associated with the health insurance carrier.
Scope	Optional Scope of coverage. Select the scope of coverage (you can select more than one) for the insurance policy from the pick list: <ul style="list-style-type: none"> Dental Hospital Inpatient Long Term Care Medical & Allied Services Hospital Outpatient Prescription Drugs Vision Care

Insurance Coverage, Continued

Field Name	Description
Excluded Benefits	Optional Select the benefit (you can select more than one) that is not covered by the insurance from the pick list Brace Repair Braces Dental Glasses Repair Hearing Accessories Hearing Aids Orthodontics Other Shoes
Last Nm	Required Policy Holder Last Name. Enter the policy holder's last name (alphanumeric).
First Nm	Required Policy Holder First Name. Enter the policy holder's first name.
M	Optional Policy Holder's Middle Initial. Enter the policy holder's middle initial.
Phone #	Optional Policy Holder's Phone Number. Enter the policy holder's phone number. Acceptable formats include: <ul style="list-style-type: none"> • 1111111111 • (111)111-1111 • 111-111-1111 • 111.111.1111
Relationship to Pol. Holder	Optional Relationship to Policy Holder. Select from pick list: Dependent Other Self Spouse
Comments	Optional Enter comments.
Last Update By	Display only System displays the last user's name who modified any data.
Date	Display only System displays the date of the last change.

Insurance Coverage, Continued

Carrier not found in pick list

If the insurance carrier is not found in the pick list, contact the CMS Net Help Desk.

Insurance Records with the same start and end dates are not allowed

The following message appears when you attempt to enter an insurance carrier that already exists for a client with the same carrier name, policy start date, and policy stop date.

Insurance Carrier Plan record already exists in CMS Net,
duplicates are not allowed
(?) Press Enter

Policy Start Date Cannot Be Greater than MEDS Future Pending Month

The Start Date on the CMS Net Insurance Coverage Screen cannot be greater than MEDS Future Pending Month. MEDS future pending month is the MEDS current month + 2 months.

Policy Stop Date Cannot Be Greater than MEDS Future Pending Month

The Stop Date on the CMS Net Insurance Coverage Screen cannot be greater than MEDS Future Pending Month. MEDS future pending month is the MEDS current month + 2 months.

Insurance Coverage, Continued

**Confirmation
Message When
You Add
Insurance
records with
the Same
Carrier Name**

CMS Net will provide a confirmation message when you *ADD* a new record with the same carrier name but whose start date or stop date differs.

```
Insurance Carrier Plan records exist,  
but may have different Start/Stop dates.  
Do you want to update?  
(?) NO  
( ) YES
```

- ✓ If you type “Y,” then CMS Net will save the insurance information.
- ✓ If you type “N,” then the insurance information that you entered will be discarded.

Insurance Coverage, Continued

**Action Menu
Commands**

The Insurance Coverage Action Menu has three selections:

Command	Action
Save	Save will: Save data on the screen. If the case is "Active" or "Transfer Active" the carrier added will be sent to MEDS to be posted to Health Insurance Segment (HIS) for post payment recovery and/or cost avoidance. The user is taken to the Branch Menu after saving.
Cancel	Cancel will: Return the user to either the Eligibility Menu or Event Tracking depending on how the user entered the Insurance Coverage Screen. The system will NOT save any changes.
Quit	Quit will: Remove the Action Menu and return to the Insurance Coverage screen.

Step	Action
1	Enter the appropriate option.
2	Press <Enter>.

Insurance Coverage, Continued

**Insurance
Coverage
Branch
Menus**

The system will send the user to the Insurance Coverage Branch Menu when Save is selected:

When the user accesses the Insurance Coverage screen from Eligibility, the following Insurance Coverage Branch Menu is displayed after the system saves Insurance Coverage information:

(?)	Narrative for Insurance Coverage
()	Mail Message for Insurance Coverage
()	Eligibility Menu

When the user accesses the Insurance Coverage screen from Event Tracking, the following Insurance Coverage Branch Menu is displayed after the system saves Insurance Coverage information:

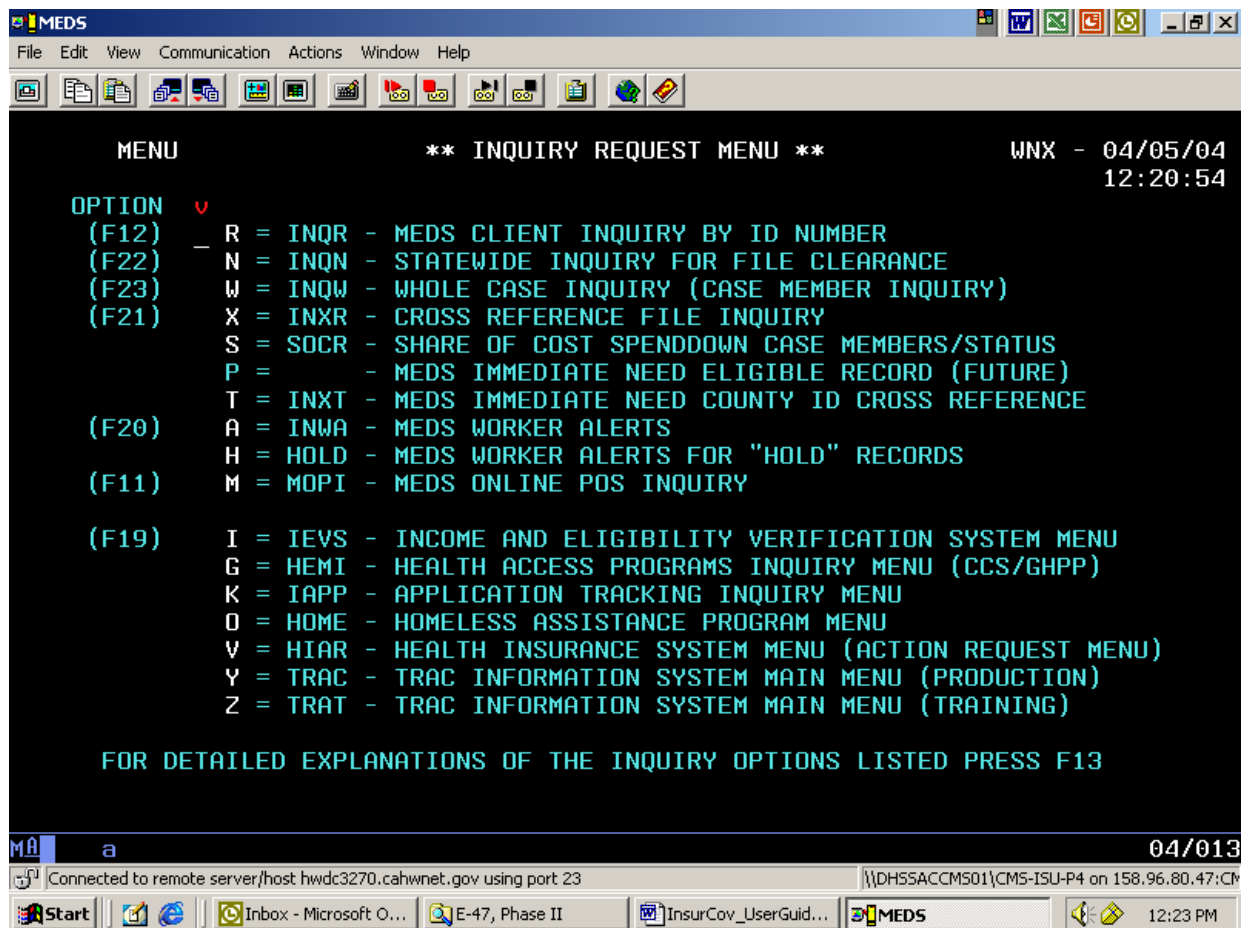
(?)	Narrative for Insurance Coverage
()	Mail Message for Insurance Coverage
()	Event Tracking

Notes

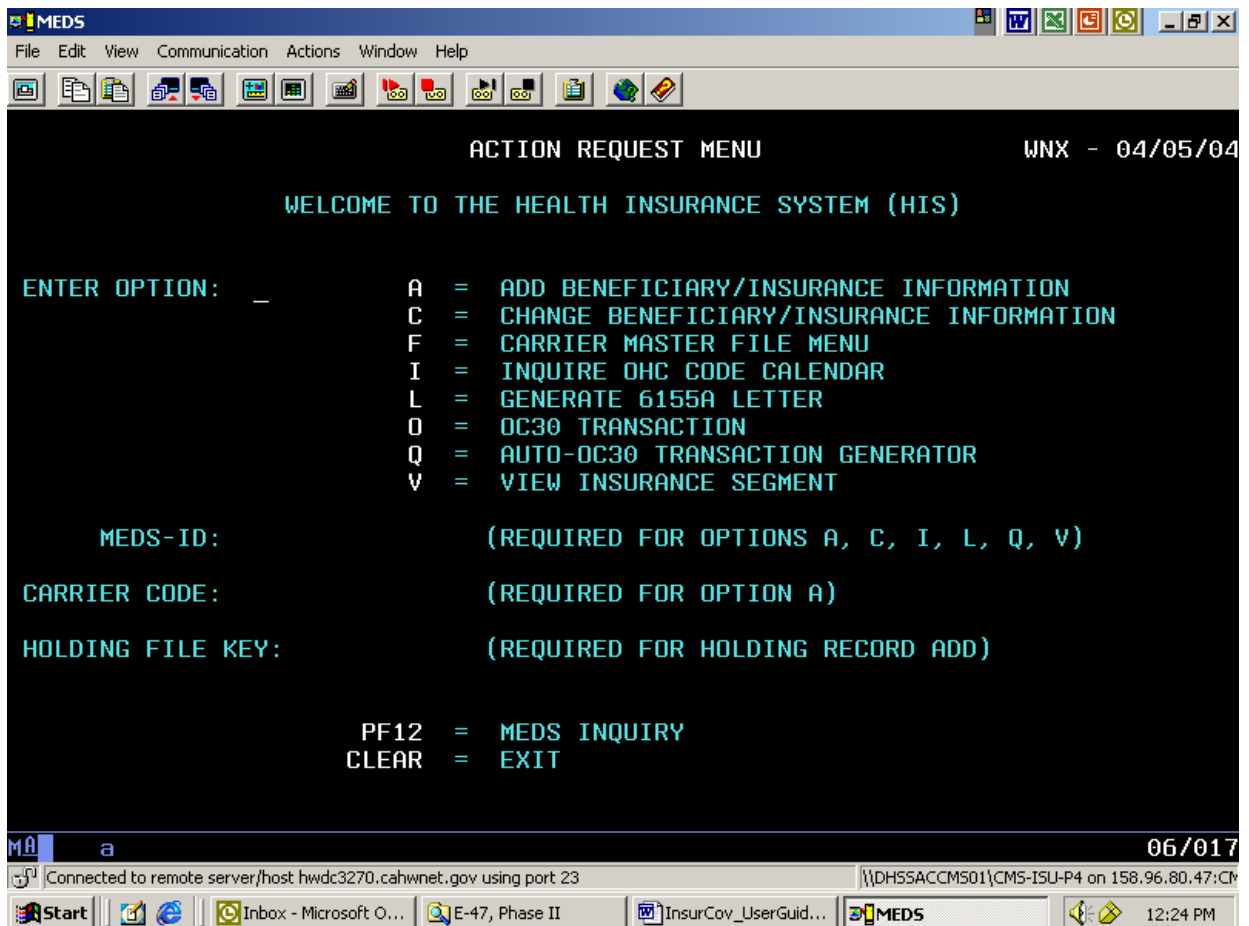
Appendix A – Helpful Hints on locating an Insurance Carrier

The pick-list that is provided in the “Carrier” name field on the Insurance Coverage screen is filtered to only include carriers with an “Active” status in the Carrier Master File. If a carrier has been suspended and an alternate carrier has been assigned you can discover this information by viewing the Carrier Master File through MEDS. You can also discover if this client has Insurance information already posted to the HIS segment through MEDS.

From the Inquiry Request Menu in MEDS, select Option V:



You will then be presented the Action Request Menu for the HIS database as illustrated:



If you want to see if Insurance information has already been applied to the HIS database for this specific client enter option V and the MEDS ID for the client. If an insurance record has already been applied to the HIS database you will be provided the following:

MEDS

File Edit View Communication Actions Window Help

*** VIEW HIS INFORMATION *** BWQ - 04/20/04

ONLINE TRGT , HISTCURR A DOB: 07-09-1994 SSN: 602 20 0065
 EW20 ONLINE AID 44 SEX: F CNTY-ID: 03-30-6022T01-1-01
 744 P ST PND-OHC: A CASENAME:
 SACRAMENTO 95814 CUR-OHC: A HIC-NO:
 BENE-PHONE: (916) 657 0606 CNTY-EW-PHONE: ()
 HIQ6155A? R HIQDATE: 05-22-2004 OHC-LETTER:
 SEGMENT TYPE: INSURANCE 1 SEG 01 OF 03 IVD-MEMBER-NO:
 ADD-DATE: 05-22-2004 CHANGE-DATE: 05-22-2004 TRANS-TYPE: A OPR: CCS
 BENE-STATUS: RELATIONSHIP TO P.H.: DEPENDENT-CVG-AVAIL?:
 CARRIER: CHAMPUS PRIME CITY: AURORA CCODE: C653
 POLICY-HOLDR NAME: LAST HIPRPT FIRST JAMES W PH-SSN 602 20 0061
 C/O ADDR: STREET ADDR
 CITY/STATE: ZIP: PH-PHONE: ()
 POLICY-NO: ABS-PARENT-INS? (Y/G):
 POLICY START DATE: 02 01 2004 STOP DATE: 06 28 2004 TERM-REAS:
 UNION NAME: LOCAL NO:
 EMPLYR/GRP: EMPL/GRP NO:
 C/O ADDR: STREET ADDR
 CITY/STATE: ZIP: PHONE: ()
 SOURCE OF INFO: CCSA SCOPE OF COVERAGE: DIM P V
 ACTION: _ (N=NEXT, P=PREV, H=MENU, I=INQ, X=MEDS INQ *** PRESS CLEAR TO EXIT

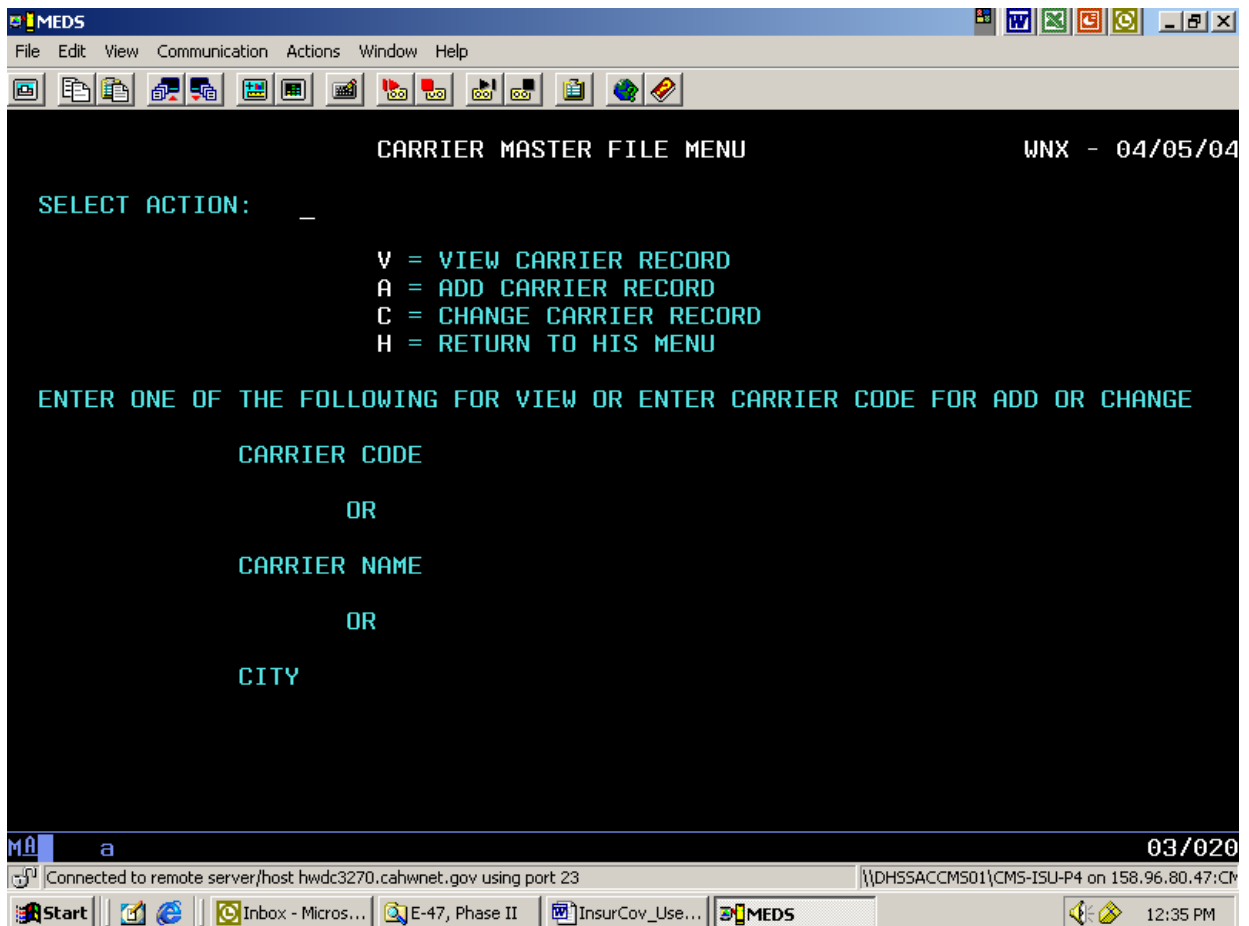
M& a 22/010

Connected to remote server/host hwdc3270.cahwnet.gov using port 23 \\DHSSACCM501\CMS-ISU-P4 on 158.96.80.47:CM

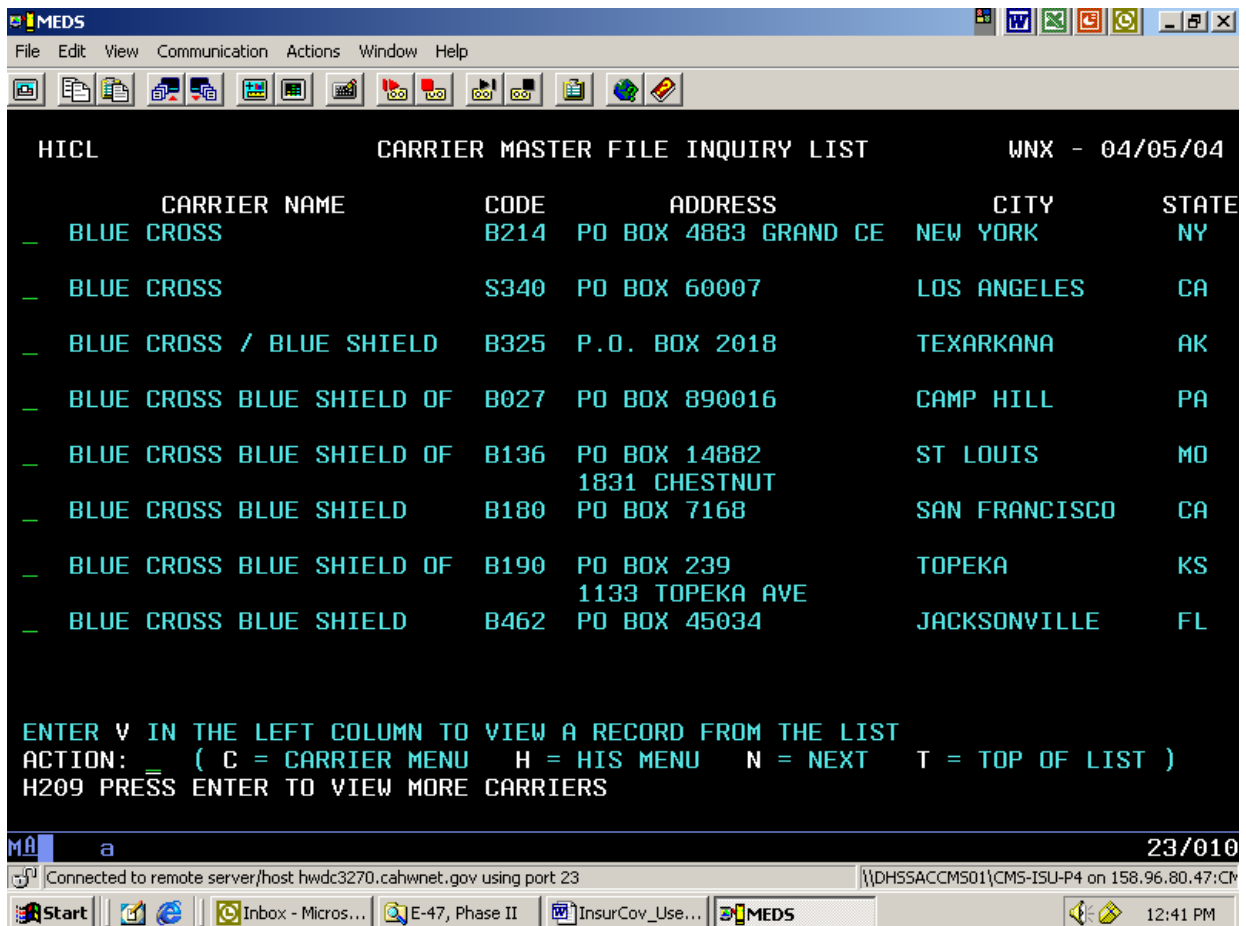
Start [2] 01:07 ~... E-47, Phas... MEDS CMSTRAIN InsurCov_... 1:05 PM

If no insurance has been applied to the HIS database for the specific client you will receive the same screen without any information present.

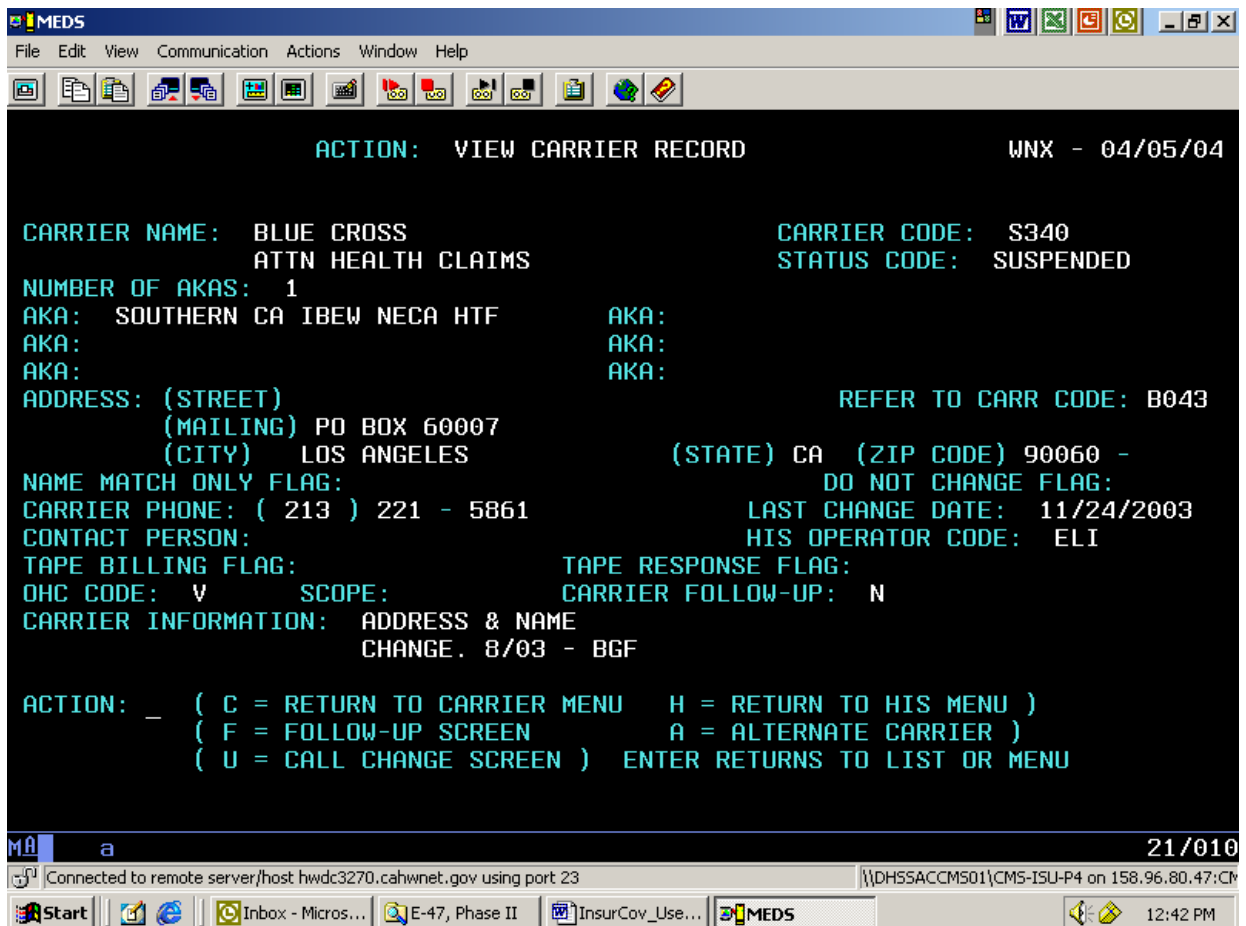
If you would like to see the status of a specific **carrier** on the Carrier Master File you would select option "F" from the Action Request Menu and receive the Carrier Master File Menu:



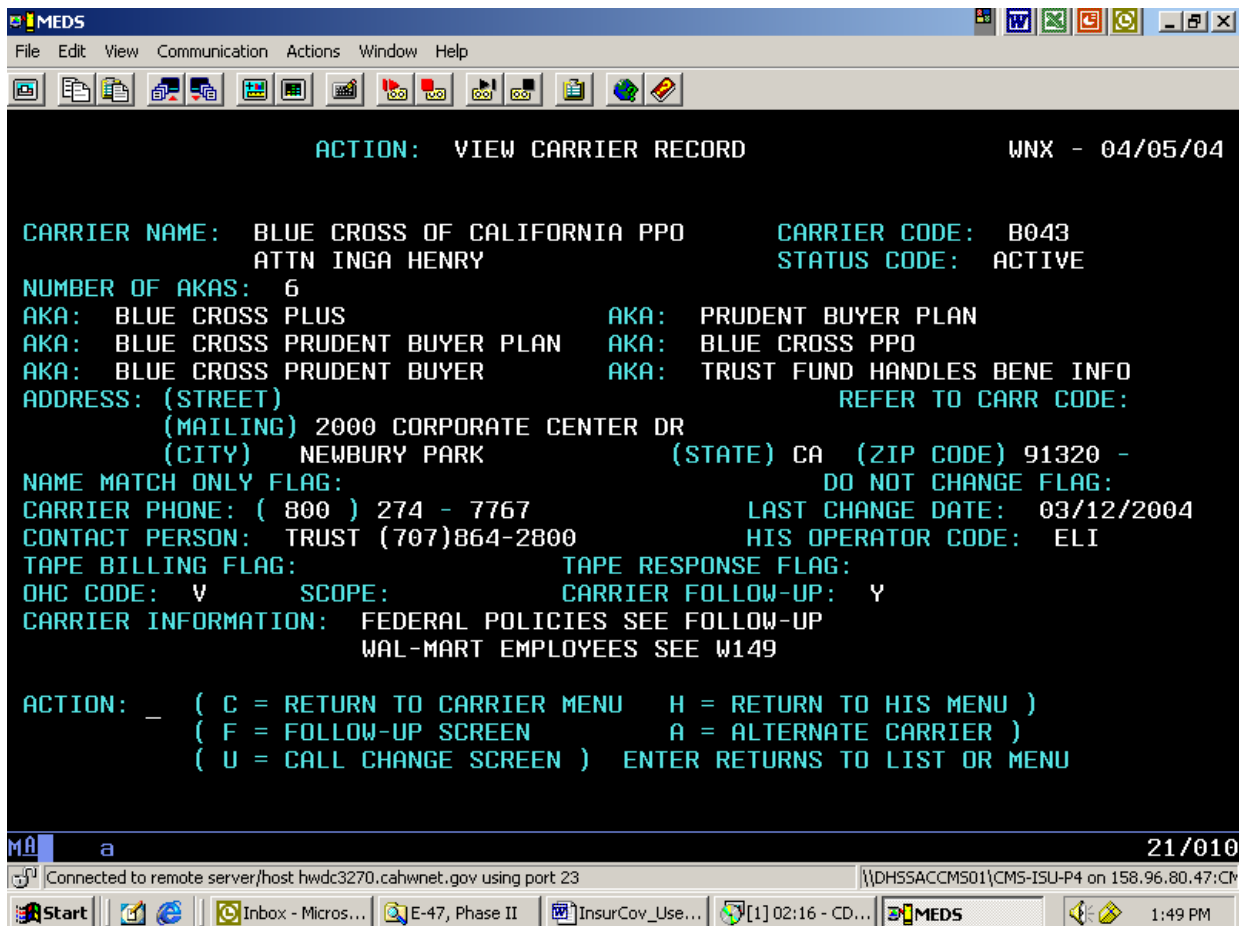
If you know the Carrier Code associated to the carrier you are trying to research, type “V” at the Select Action prompt and enter the Carrier Code. If you don’t know the carrier code associated to the carrier, type “V” at the Select Action prompt and either enter the Carrier Name or the City that the carrier’s address is in. You will receive the Carrier Master File Inquiry List to select from:



Using the commands provided you can scroll through the list or you can select a carrier and see more specific information. By entering “V” on the line specific to a carrier you will be presented the View Carrier Record screen which is the screen that provides the most detailed information relative to a carrier:



In the Status Code field you can see that this specific carrier has been suspended. Below that field is a field titled “Refer to Carr Code”, if there is a value in that field, that means that the suspended carrier has been tied to an alternate carrier. If you enter “A” in the Action field you will be presented the View Carrier Record for the alternate carrier:



In this specific example, Blue Cross located at P.O. Box 60007 in Los Angeles has been suspended and the alternate carrier is Blue Cross of California PPO (Carrier Code B043). There are times where there will be follow-up notes that can assist you in making your determination of which carrier to use. The field titled, "Carrier Follow-Up" will have a "Y" entered to indicate there are notes. If you enter "F" in the Action field you will be provided the View Carrier Follow Up screen where notes are stored relative to that specific carrier:

